



Job Title	Team Leader and Caseworker (Crisis & Resilience Service)
Reporting to	Service Co-ordinator
Hours	37.5 per week (Team Leader duties are approx. 15 hours of this)
Salary	£28,800 - £30,553 FTE depending on experience
Pension	5% employer contribution
Location	Somerset - Hybrid (home and office based) The Team Leader will be expected to travel to meet each caseworker once every 6 weeks and to attend team and other meetings.
The Role	<p>The Citizens Advice Somerset Resilience team comprises advisers and caseworkers providing targeted advice and casework to individuals and family households in Somerset who are at risk of financial vulnerability or who have used the Crisis Payments to alleviate financial distress.</p> <p>Typically, these are clients/families struggling financially due to a key life event or a change of circumstance that has led to a financial shock or risk of a financial crisis.</p> <p>The project is funded by the DWP Crisis and Resilience Fund and the Citizens Advice Somerset Resilience Team work alongside other voluntary organisations as part of the Somerset Crisis and Resilience Fund Alliance (CRF Alliance).</p> <p>The Team Leader will co-ordinate the work of the Resilience Team providing direct supervision and practical assistance to the advisers and caseworkers. The Team Leader will also undertake advice and casework delivery, working with clients in person at agreed locations across Somerset and via phone and video call.</p> <p>The team are required to develop working relationships with the 12 Somerset Neighbourhood Hubs and our CRF Alliance partners. Reporting to the Service Co-ordinator the Team Leader will assist in representing the Resilience Team within the community networks.</p> <p>The role requires someone that thrives in a busy and fast paced work environment and who is a confident communicator and experienced adviser or caseworker, ideally with a background in money advice or financial capability (training is available).</p> <p>The role will suit someone who is highly organised with the ability to coach and support team members whilst also ensuring that the project team are delivering to targets within a quality assured framework.</p> <p>The post will be split between home based and office based at one of our Somerset offices (Taunton, Bridgwater, Shepton Mallet, Yeovil).</p>

	The post will be subject to a DBS Enhanced Disclosure Check
--	---

Role Responsibilities

1. Our values

- Work within the ethos and values of Citizens Advice Somerset
- Develop positive, trusting and professional relationships with clients, colleagues, partners and external agencies
- Always demonstrate a commitment to the aims, principles and policies of the Citizens Advice Service and our Equity, Diversity and Inclusion policies
- Provide peer support and guidance to other less experienced staff and volunteers.

2. Team Leader

- To work under the direction of the Service Co-ordinator leading on this project to oversee the day-to-day delivery of the Resilience Team Service and co-ordinate the team's work in accordance with the funding contract, project plan, Citizens Advice and FCA quality standards and organisational policies
- To represent the Team at Neighbourhood Hub or Alliance meetings and promote access to the service
- To receive and allocate referrals, and oversee the number of open and closed cases and a manageable workload for each team member
- To provide advice and casework development oversight and supervision to the team members
- To oversee case recording ensuring the correct codes and outcome data is recorded
- To ensure the Team have access to expert technical support where needed (for example in relation to money and debt advice)
- To provide one to one line management supervision to the team members and facilitate monthly team meetings
- Assist the Service Co-ordinator to monitor quality compliance and performance and complete case checking including, where appropriate, IFRs (Individual File Reviews)
- To work alongside the Client Services Operations Manager and the Service Co-ordinator to develop the service and to build and maintain effective relationships with funders and stakeholders

3. Provision of Advice and Casework

- Provide advice and casework covering the full range of clients' presenting issues
- To maintain and manage a client caseload
- Identify urgent situations and ensure any possible action is taken immediately
- Assist clients in making applications for grants and other schemes where relevant
- Assist clients with other problems which are an integral part of their case, referring to other agencies as appropriate

- Maintain timely, accurate and detailed case records, key dates systems and adhere to administration policies and processes
- Maintain statistical information and other required documents and undertake client feedback surveys and facilitate client evaluation
- Ensure all work casework conforms to Operational Policy, including meeting the requirements of the Advice Quality Standard, FCA and MaPS

4. Stakeholder Engagement

- Maintain awareness of the wider CRF Alliance partners and build relationships as appropriate
- Participate in locality meetings as appropriate
- Maintain liaison with relevant external agencies

5. Research & Campaigns and Monitoring

- To stay abreast of issues that we and the wider Citizens Advice network are campaigning upon
- Contribute to our research and campaign work by providing information about clients' circumstances through the appropriate channel

6. Personal and professional development

- Complete induction and any training to obtain the skills required for the role.
- Keep up to date with legislation, case law and procedures relating to advice provision and undertake the annual mandatory professional development training
- Complete continuing professional development training as appropriate and in accordance with the Citizens Advice standards of practice
- Maintain up-to-date adviser knowledge and undertake relevant training within the Advice Quality Standards
- Engage effectively with supervision, appraisal and individual file review to improve your performance and advance your professional development.
- Assist in initiatives to improve services

6. Other duties

- To attend, participate and contribute to team meetings and other meetings
- Abide by health and safety guidelines and share responsibility for your own safety and that of colleagues
- Ensure the highest standard of consideration and respect to all stakeholders of the Citizens Advice Service, including clients, volunteers, colleagues and funders.
- Carry out any other tasks and support Citizens Advice work as necessary.

Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the job and is not intended to be an inflexible list of tasks.

Person specification		Shortlisting matrix
1.	Qualified and competent generalist adviser holding the relevant accredited quality standard and other competencies set down by Advice Quality Standard, Money and Pension Service, FCA and/or Institute of Money Advisers.	Essential Application, interview and advice training record
2.	Demonstrable and thorough understanding of the application of income maximisation process in a busy advice organisation and of doing so in an ordered and efficient way, including where appropriate, through a referral into the Money Advice Service (MaPS) funded programme.	Essential Application and interview
3.	Experienced in providing advice with casework and a demonstrable understanding of the social welfare schemes available to support clients (CRF Crisis Payments or equivalent, Food Banks, Council Tax Reduction etc).	Essential Application and interview
4.	Experienced in providing effective guidance and support to peers and junior colleagues and the ability to plan and co-ordinate the workload of others. Training will be available for candidates with relevant transferrable skills and experience, but who have not held a previous role as a line manager.	Essential Application and interview
5.	Ability to maintain self-awareness in relation to your own emotional wellbeing and to use support where appropriate, and to ensure that the team are similarly able to use support to maintain health and wellbeing in their role.	Essential Application and interview
6.	Excellent interpersonal, communication, negotiation and client service skills, in particular high standards of written and verbal communication including representing clients, preparing correspondence and report writing.	Essential Application and interview
7.	Ability to work effectively as part of a team and competent to work remotely using your initiative to prioritise your work, meet deadlines and ensure clients' needs are met	Essential Application and interview
8.	High standards of numeracy and literacy with excellent IT and administrative skills. Able to work accurately and efficiently using MS Office (excel, word, outlook, power-point, Teams etc) and other cloud-based systems.	Essential Application and interview
9.	A positive approach to quality of advice audit (including peer review and external audit) and a commitment to constructive feedback as part of the quality assurance and learning process (as a recipient and as a supervisor).	Essential Application and interview
10.	An understanding of, and commitment to, the aims, principles and policies of the Citizens Advice service and the positive value of equity, diversity and inclusion.	Essential Application and interview

11.	A commitment to travelling to various locations as required.	Essential Application form
12.	Experience of managing a team and/or project successfully.	Desirable Application form